



# Getting Useful Real-Time Feedback About Your Program

May 25, 2011

Lilah Glick, *Greater Cincinnati Energy Alliance*

Sara Van de Grift, *Wisconsin Energy Conservation Corporation*

Jane Peters, *Research Into Action*

# New Evaluation Resources & Tools

- For Consumers
  - Program Evaluation Topics & Questions Library – for Participants
  - Example Email Survey for Successful Participants
  - Example Phone Survey for Drop Outs
  - Example Phone Survey for Screened-out Applicants
- For Contractors
  - Program Evaluation Topics & Questions Library – for Contractors
  - Example Phone Survey for Contractors

[BetterBuildings Google Site](#)

BetterBuildings website

<http://www.betterbuildings.energy.gov/>



Greater Cincinnati  
**Energy  
Alliance**

# **How to Conduct Real Time Evaluation**

Wednesday, May 25, 2011

Lilah Glick, Marketing and Community Outreach Director



# About Us

- Non-profit 501c3 organization – April 2008
- Energy Efficiency/Renewable Energy Services
  - Education/Outreach
  - Project Management
  - Financing
- Market Focus
  - Residential
  - Non-profit Commercial

# Public/ Private partnership



- ▣ Greater Cincinnati Foundation
- ▣ Department of Energy: Better Buildings
- ▣ Energy Efficiency and Conservation Block Grant (EECBG)
  - Hamilton County, OH
  - City of Cincinnati, OH
  - Kenton County, KY
  - Boone County, KY
  - Campbell County, KY
  - City of Covington, KY
  - City of Florence, KY



# How to Evaluate Success?



## Phone Blitz & Online Evaluation

- November 2010 – January 2011
- Current Strategy to improve conversion rates

## Performance Systems Development

- Launch date: End April
- Customized IT tool to better serve customers and evaluate program deliveries

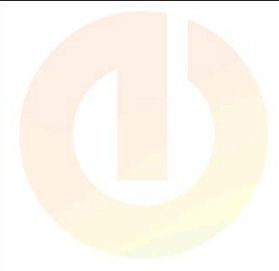
# Online and Phone Evaluation



- ❑ **Survey 3 target groups:**
  - ❑ Audits not scheduled
  - ❑ Audits completed
  - ❑ Retrofits in process/ completed
  
- ❑ **Phone Blitz goals:**
  - ❑ Rate GCEA's programs and services
  - ❑ Evaluate customer's satisfaction with contractors
  - ❑ Urge customers to move forward with audits and retrofits
  - ❑ Gather testimonials for website and assess interest in focus groups
  
- ❑ **Program logistics:**
  - ❑ November 2<sup>nd</sup>
  - ❑ GCEA staff and three volunteers (Training)
  - ❑ Online phone script & survey

# Phone Blitz Survey Results:

## Audits Requested



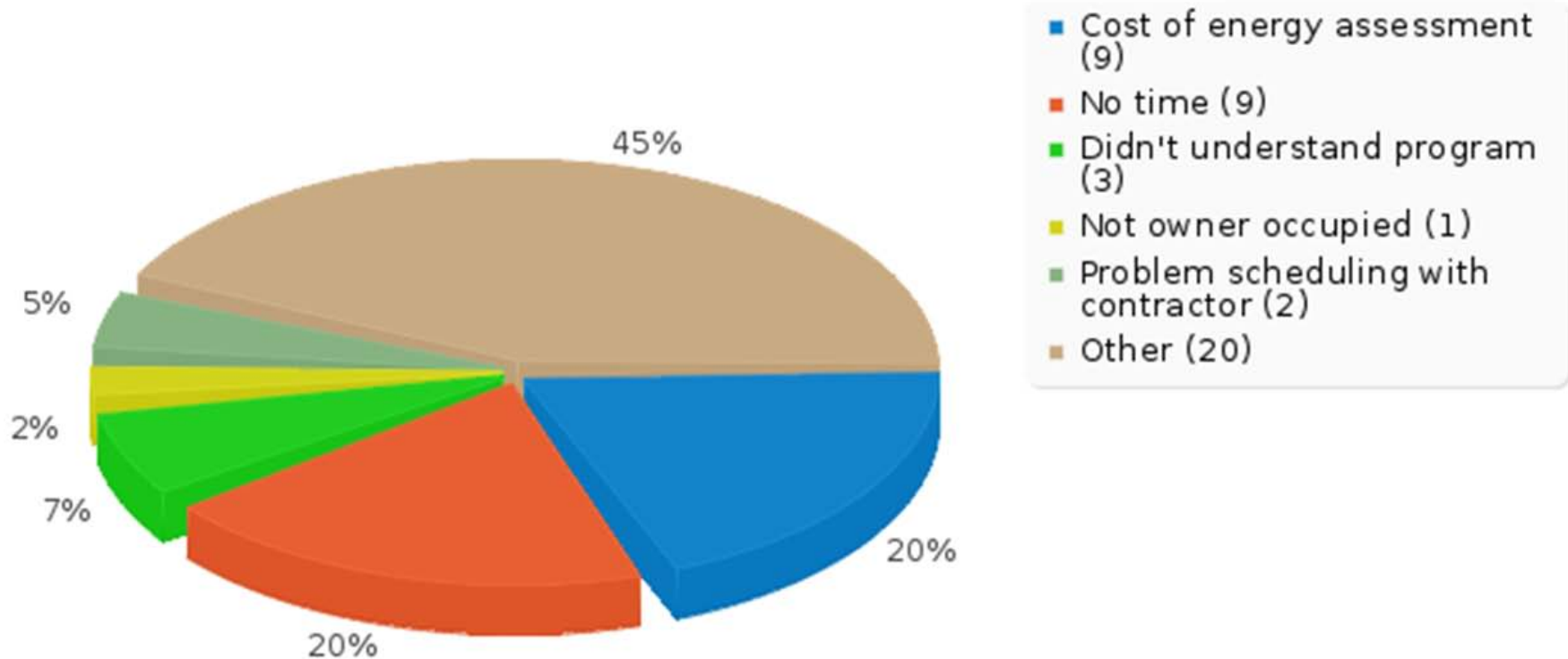
### □ **Customer Survey: Audit Requested**

▣ 367 in call pool, 121 responses

Question	Yes	No	Yes %
Participate in survey?	108	15	88%
Contacted by contractor?	47	61	44%
Schedule your audit?	45	16	74%
Already scheduled audit?	17	30	36%
Sign up for newsletter?	33	90	27%



# Reasoning for not Scheduling Assessment





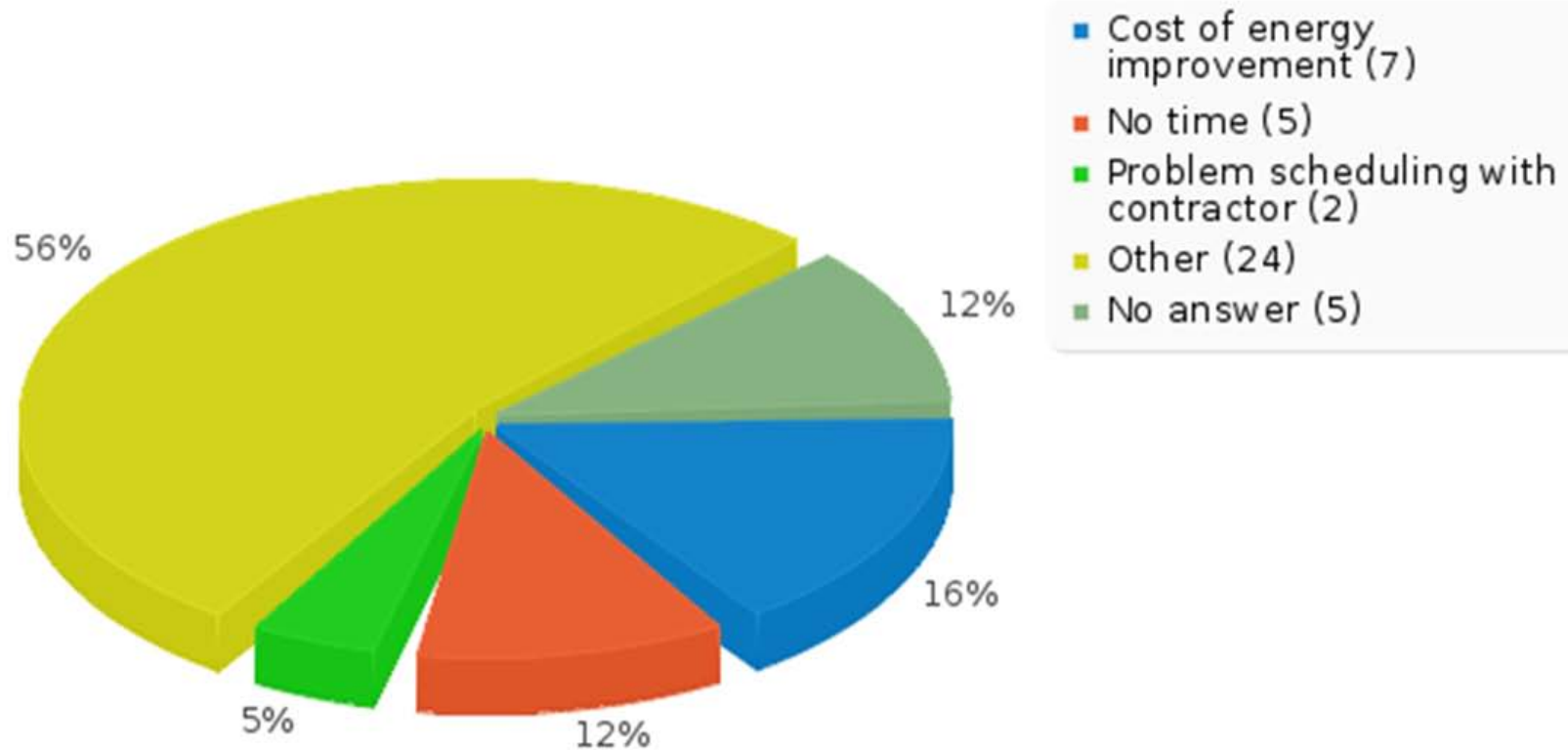
# Phone Blitz Survey Results: Audit Completed

## □ **Customer Survey: Audit Completed**

▣ 173 in call pool, 57 responses

Question	Yes	No	Yes %
Schedule retrofit?	13	43	23 %
Received a report after audit?	33	2	94%
Interested focus group?	27	21	56%
Receive newsletter?	19	37	34%

# Reasons for not Scheduling Retrofits

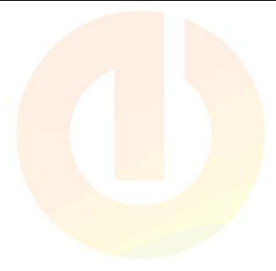


# Performance Systems Development



- 5 Important Tools:
  - ▣ Customer Web Portal
  - ▣ Energy Management Program Site
  - ▣ Green Energy Compass
  - ▣ Building Performance Compass
  - ▣ Field Collection Tool

# Home Energy Portal

[About](#)[For Homeowners](#)[For Nonprofits](#)[For Contractors](#)[Get Connected](#)[Media](#)

## Compare Your Home

How energy efficient is your home?

Complete your energy profile to see how much money you could be saving, find an Energy Alliance-approved home performance contractor, and request a \$50 energy assessment.

[Login](#)[Sign Up](#)

## Join Our Newsletter

Receive the latest Energy Alliance updates, events, and energy efficiency news - sign up for our monthly e-newsletter



"My daughter can now comfortably move from her smaller room into a newly air-sealed and insulated larger room, and she is very excited! That is priceless."

- Stuart Schaefer  
Wyoming resident

## About Us



## Sign Up



## Financing



# Create User Account

[About](#)[For Homeowners](#)[For Nonprofits](#)[For Contractors](#)[Get Connected](#)[Media](#)

## Compare Your Home

How energy efficient is your home?

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[Home » User account](#)

## User account

[CREATE NEW ACCOUNT](#)[LOG IN](#)[REQUEST NEW PASSWORD](#)

### ACCOUNT INFORMATION

**Username: \***

Spaces are allowed; punctuation is not allowed except for periods, hyphens, and underscores.

**E-mail address: \***



A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

**Password: \***



# Utility Data



About For Homeowners For Nonprofits For Contractors Get Connected Media

## My Account

[My Energy Profile](#)


[Reports](#)

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## Join Our Newsletter

Receive the latest Energy Alliance updates, events, and energy efficiency news - sign up for our monthly newsletter today!

Email address 



**Find a Contractor**

See Participating Service

Home » My account

## Your Home's Energy

DASHBOARD

CONTACT

BUILDING

ENERGY USE

REPORTS

HELP

By entering your utility usage information, you can view your home's energy performance and see how much you may be able to save on your energy bills. The easiest way to get your utility usage information is by connecting to your [Duke Energy Online Services](#) account. Online Services is a free service that allows you to view and pay your Duke Energy bills online. Your home performance contractor will use your annual energy use to calculate your potential savings through home energy improvements. If you would like to provide your utility usage information later, you can connect with a [home performance contractor](#) now to schedule your home energy assessment.

## ELECTRICITY



How to get  
my utility data

Electric Utility: Duke Energy



Get my data  
automatically

## Your Monthly Meter Readings:

*Dates shown are the meter reading dates on your utility bill*

MONTH	2010 May	2010 Jun	2010 Jul	2010 Aug	2010 Sep	2010 Oct	2010 Nov	2010 Dec	2011 Jan	2011 Feb	2011 Mar	2011 Apr
DAY	18	18	18	18	18	18	18	18	18	18	18	18
USE (kWh)	414	415	417	401	401	405	444	488	500	501	259	515

# Select Contractor



## My Account

[My Energy Profile](#)


[Reports](#)

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## Join Our Newsletter

Receive the latest Energy Alliance updates, events, and energy efficiency news - sign up for our monthly newsletter today!

Email address 



## Find a Contractor

See [Participating Service Providers](#) in your area.

[Home](#)

## All Contractors

### ARRONCO COMFORT AIR, INC. Burlington, KY

[Request Assessment](#)

#### Job Types:

"Whole House" Home  
Performance Energy  
Remodeling  
Energy Auditing (BPI/RESNET  
certified)  
Air Sealing/Insulation

#### Programs:

##### Description:

Arronco Comfort Air is family owned and operated company that has served the Tri-State area since 1984. With 27 years of experience in the home energy business, Arronco has pioneered the industry by taking a holistic approach to looking at ones home or business as a complete system. Arronco Comfort Air's mission is to be your full service home energy professional, specializing in geothermal technology, air sealing, and insulation with a strong commitment to superior customer satisfaction.

### CINCINNATI ENERGY SOLUTIONS Cincinnati, OH

[Request Assessment](#)

#### Job Types:

"Whole House" Home  
Performance Energy  
Remodeling  
Energy Auditing (BPI/RESNET  
certified)  
Air Sealing/Insulation

#### Programs:

##### Description:

Cincinnati Energy Solutions was established in June 2009 by Jeremy Begley. Begley, a Cincinnati State graduate in Environmental Engineering Technology and Renewable Energy and Energy Efficiency, realized that energy efficiency was a way that the construction industry might see revitalization. Cincinnati Energy Solutions' area of expertise is in energy efficiency for residential and small business buildings in the Greater Cincinnati area. CES offers multiple layers of service, from building evaluations and home energy audits to full efficiency upgrades, including the installation of renewable energy sources.

### GREENERGY PROFESSIONAL SERVICES LLC Burlington, KY

[Request Assessment](#)

#### Job Types:

"Whole House" Home  
Performance Energy  
Remodeling  
Energy Auditing (BPI/RESNET

#### Programs:

##### Description:

Greenergy is a Home Performance Contractor in Cincinnati and Northern Kentucky, specially trained and certified to perform testing for both the Greater Cincinnati Energy Alliance and Kentucky Home Performance with ENERGY



# Contractor Reporting



## BUILDING INFORMATION

Demo Building  
123 Maple St  
Cincinnati, OH 45013

## JOB STATUS



Assessment Scheduled



Select Job

Upload All Changes

BUILDING

IMPROVEMENTS

INCENTIVES

CALIBRATION

SUMMARY

REPORTS

### General

Contact & Location

### Building

Structure

Heating

Cooling

Hot Water

Appliances

### Consumption

### Measurements

### Help

## STRUCTURE

Weather Station Covington, KY

Year Built 1983

Number of Occupants 4

Number of Stories 2

Number of Bedrooms 0

Building Type Single Family Detached

Conditioned Floor Area 2500

Ceiling Height 0

Attic Type

Foundation Type Unknown

Floor Insulation Depth (inches) 0

Rim Joist Insulation Level No

Above Grade Wall Insulation Thickness 0

powered by  GREEN ENERGY  
Compass

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2011.415.0.2634

# Green Compass



Demo Building

## BUILDING INFORMATION

Demo Building  
123 Maple St  
Cincinnati, OH 45013

## JOB STATUS



Assessment Scheduled



Select Job

Upload All Changes

BUILDING

IMPROVEMENTS

INCENTIVES

CALIBRATION

SUMMARY

REPORTS

- Insulation
- Air Sealing
  - Air Sealing
- Heating/Cooling
- Windows/Doors
- Lighting
- Appliances
- Hot Water
- Other Improvements

All

### AIR SEALING IMPROVEMENTS

Reduce the house air leakage from 50 CFM50 to 20 CFM50.

Cost: \$1,000.00

New Improvement

#### IMPROVEMENT

Reduce the house air leakage from 50 CFM50 to 20 CFM50.

#### STATUS

☐ Installed ☒ Recommended ☐ Not Installed

#### COST

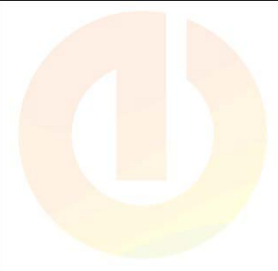
Total Cost 1000

#### WORKSCOPE

Contractor

Homeowner

# Job Tracking



[Dashboard](#) | [Jobs](#) | [Contractors](#) | [Reports](#) | [Help](#) | [Logout](#) | [Account](#)

 Greater Cincinnati Energy Alliance

User: Adam Harris, GCEA

## Jobs

Total: 89 jobs in your portfolio

Job Name/ID	Address	Contractor	Score	Job Status
<a href="#">2 circus</a>	2 Circus Place Terrace Park, OH 45174	Inspired Green	2.8	Assessment Scheduled
<a href="#">2003 Claudia</a>	2003 Claudia Mt. Washington, OH 45230	Inspired Green	7.8	Assessment Returned
<a href="#">2019 Claudia</a>	2019 Claudia Cincinnati, OH 45230	Inspired Green	0.6	Assessment Returned
<a href="#">7175 Given</a>	7175 Given Rd Indian Hill, OH 45243	Inspired Green	0	Assessment Submitted
<a href="#">Allen Cliffe</a>	5726 Opengate Ct Cincinnati, OH 45247	Tiburon Energy & Construction		Assessment Requested
<a href="#">Allen Cliffe</a>	5726 Opengate Ct Cincinnati, OH 45247	Tiburon Energy & Construction	2.1	Assessment Scheduled
<a href="#">Amy Davidoff</a>	1766 Wilaray Terrace Cincinnati, OH 45230	HOUSH Home Energy Experts	0.5	Assessment Completed
<a href="#">Baldock Peg</a>	3367 Van Zandt Dr. Cincinnati, OH 45211	Home Energy Checkup, LLC	1.1	Assessment Scheduled
<a href="#">Baldock Peg</a>	3367 Van Zandt Dr. Cincinnati, OH 45211	Home Energy Checkup, LLC	2.6	Assessment Scheduled

# Salesforce



Search All... Search

Options...

AI Gaspari

Help & Training

Sales

Home Chatter Campaigns Leads **Accounts** Contacts Jobs Forecasts Contracts Cases Solutions Products Reports Documents Dashboards Google Docs +

Google Talk

[hide] [pop out]

You are not currently logged into Google Talk.

[Sign In](#)

Contacts ● Roberto ● Ka

● Ana  
Available

Search, add, or invite

● Davi  
Available

● Karine  
Available

● Roberto  
Muddy feet!  
● corgicrazy  
Available  
● Ivete

**All Accounts** [New Account](#)

**All Accounts**

Create New View | Refresh

Action	Account Name ↑	Created Date	Street Address	City	Coupon Code	Zip	How Did You Hear?	County	Email
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Andrulis Household</a>	4/27/2011	123 Walnut St	Cincinnati		45202			
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Berchenko Household</a>	5/3/2011	9096 Millcliff Dr.	Cincinnati		45231			
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Blickenstaff Household</a>	5/9/2011	1225 North Bend Rd.	Cincinnati		45224	Friend/Family		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Boone Household</a>	5/17/2011	3961 Lowry Ave	Cincinnati	greenyourhome	45229	Community Meeting		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Bourgeois Household</a>	5/13/2011	611 Ludlow Ave	Cincinnati		45220	Community Meeting		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Cifuentes Household</a>	5/3/2011	1705 Highland Ave.	Cincinnati	greenyourhome	45202	Social Media		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Concalfe Household</a>	5/5/2011	14 Main st	Cincinnati		45202	Door-to-Door Canvas		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Coulter Household</a>	5/4/2011	123 Green Street	Dayton		45402			
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Crandall Household</a>	4/25/2011	123 Green	Dayton		45401			
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Duncan Household</a>	5/8/2011	11500 Folkstone Drive	Cincinnati		45240	Community Meeting		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dunlap Household</a>	5/9/2011	916 Five Point Road	Virginia Beach		23454	Search Engine		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Dwyer Household</a>	5/12/2011	231 Greendale Avenue	Cincinnati	greenyourhome	45220	Friend/Family		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Eccard Household</a>	5/11/2011	9341 Harrison Pike	Claves		45002	Energy Alliance Contr		

1-64 of 64

Page 1 of 1

[Open Calendar](#)

# New Tools and Evaluations



- ☐ Commercial Compass
- ☐ Coupons Codes
- ☐ Online Campaigns
- ☐ Targeted Email Campaigns
- ☐ Phone Blitzes
- ☐ Password Protected Contractor Pages



[www.greatercea.org/greenyourhome](http://www.greatercea.org/greenyourhome)

# Thank You!



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[www.greatercea.org](http://www.greatercea.org)  
[facebook.com/greatercea](https://facebook.com/greatercea)  
[twitter.com/greatercea](https://twitter.com/greatercea)

*We have a passion for energy efficiency.*

# Using Process Evaluation to Improve Program Design

Sara Van de Grift

# Perspective

- A means to improve implementation approach
- Provides a snapshot on program progress
- Must be open to hearing the results, good or bad
- Can confirm or deny assumptions
- Can be iterative and focused on parts

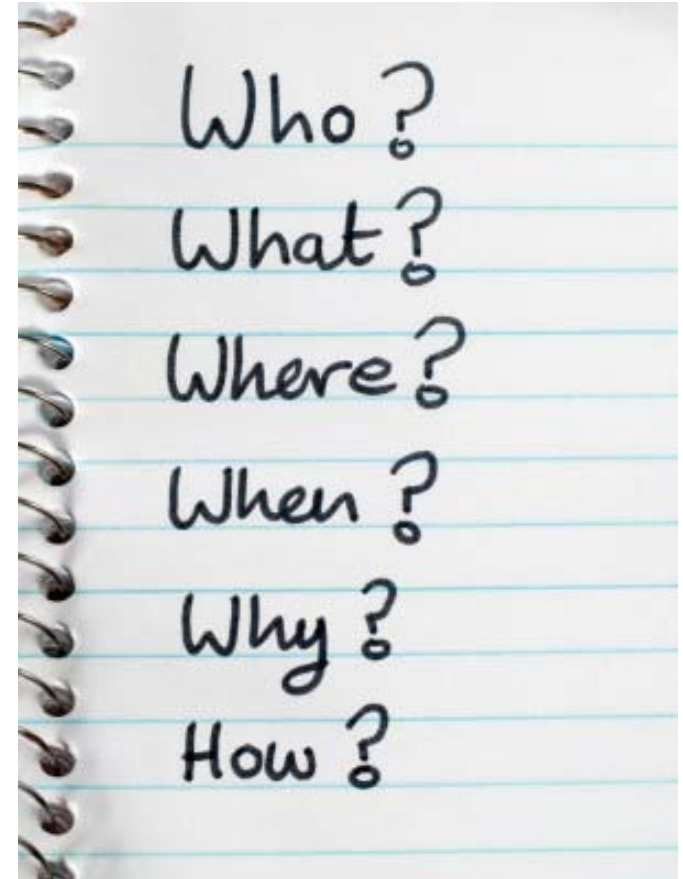


# Two Approaches

- Formal process evaluation using third-party evaluation firm
  - Higher cost
  - Experts conduct interview
  - Can provide in depth feedback
- Informal evaluation, completed in-house
  - Low cost
  - Requires some expertise
  - Will provide a flavor but not detail

# Process Evaluation Approach

- In-depth interviews
  - Program staff
  - Energy advocates
- Participant surveys
  - Census of program participants
  - Stratified by stage of project completion



# Together We Save

Leverage a community-based approach  
increase energy efficiency investments in  
the City of Milwaukee.

Achieve whole-house  
retrofits in 100 homes.



# Two Points of Evaluation on Process

## 1) Post-design, pre-launch

- Confirm assumptions
- Final tweak on design



## 2) Mid-course

- Look at inward improvements for pilot
- Look at outward improvements for version 2

# Informal Evaluation

## 1) Post-design, pre-launch

- Heavy financing focus in design
- Not supported as a need in pre-launch surveys
- Understood what partner name to leverage, different than expected
- Solicited feedback on information that might be provided
- Changed the level of detail

# Formal Evaluation

## 2) Mid-course

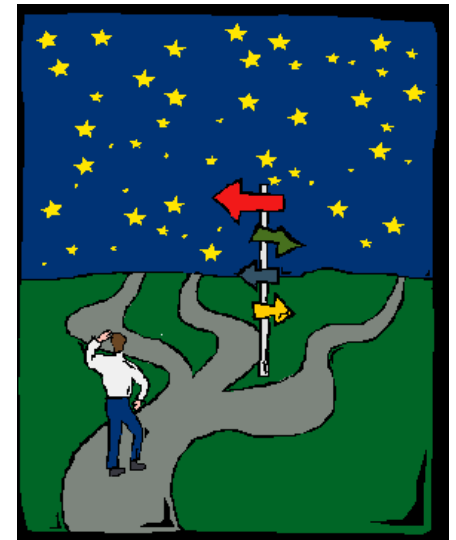
- Look at inward process improvements to process, timing was an issue
- Look at outward improvements for version 2, value of different pieces of the offer
- Allowed focus on what mattered most, advocate versus turn key contractor, etc.
- Conducted by Tetra Tech

# Most Important Factors for Customers

Program Component	% respondents
• Financial incentives	46%
• Technical assessment	31%
• Energy Advocate	28%
• Turnkey contractor approach	16%
• Financing/payment plan options	7%

# Costs

- Formal evaluation = 6% of program budget in Wisconsin
- Informal evaluation = 1.5% to 2% of program budgets
- Balance – additional costs and proceeding too far down the wrong path





# Contact Information

Sara Van de Grift

Residential Programs Director – WECC

608.249.9322, ext.160

[sarav@weccusa.org](mailto:sarav@weccusa.org)

Laura Schauer

Manager – Tetra Tech

608-316-3635

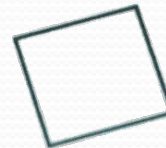
[Laura.Schauer@tetrattech.com](mailto:Laura.Schauer@tetrattech.com)

# Making Evaluation Happen

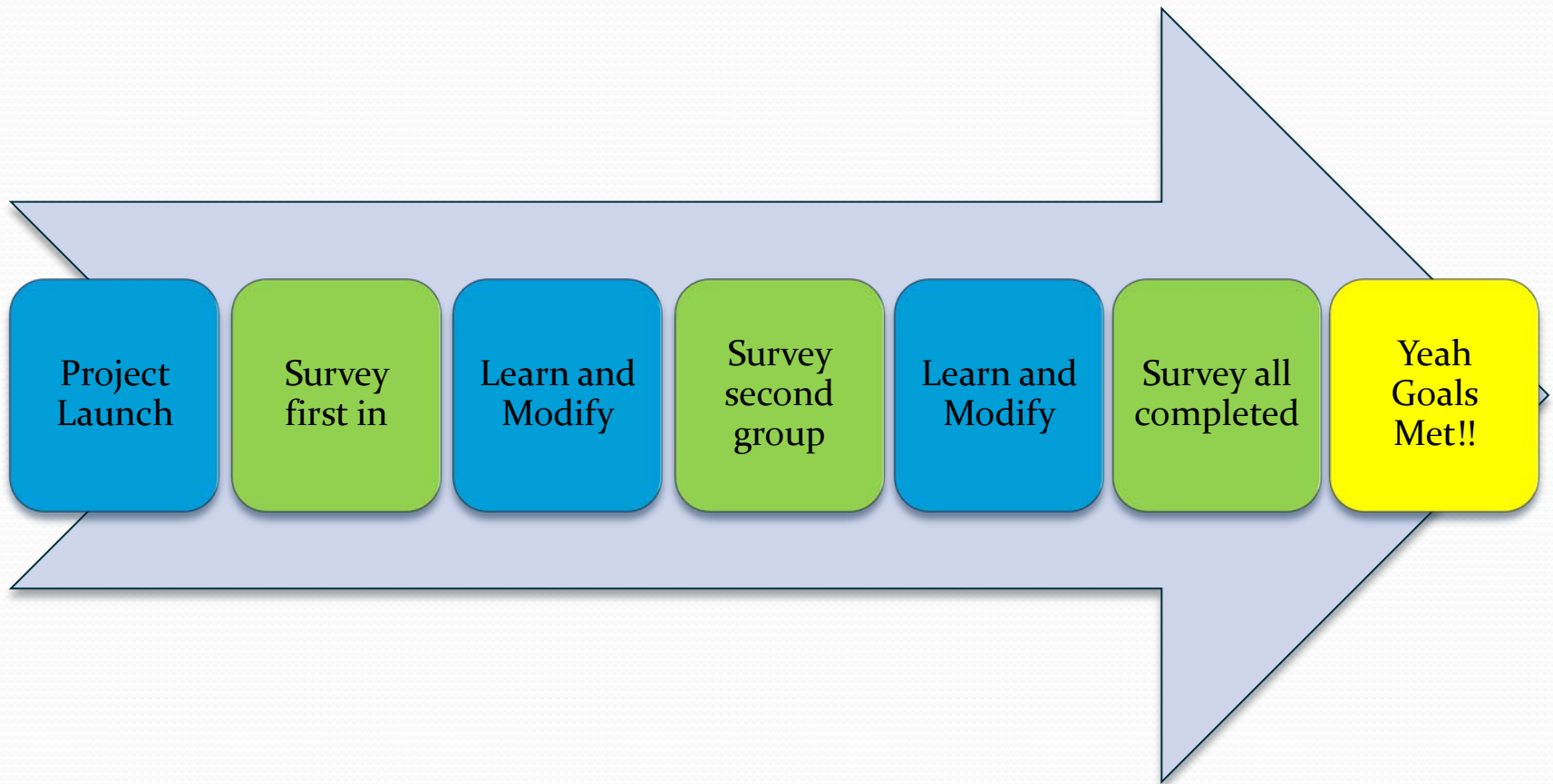
Jane Peters, Ph.D., Research Into Action

# Introduction and Overview

- What is evaluation?
- Steps to doing an evaluation
  - *Know your program theory*
  - *Data sources*
  - *Data collection tools*
  - *Data collection methods*
  - *Results*
- How to get help

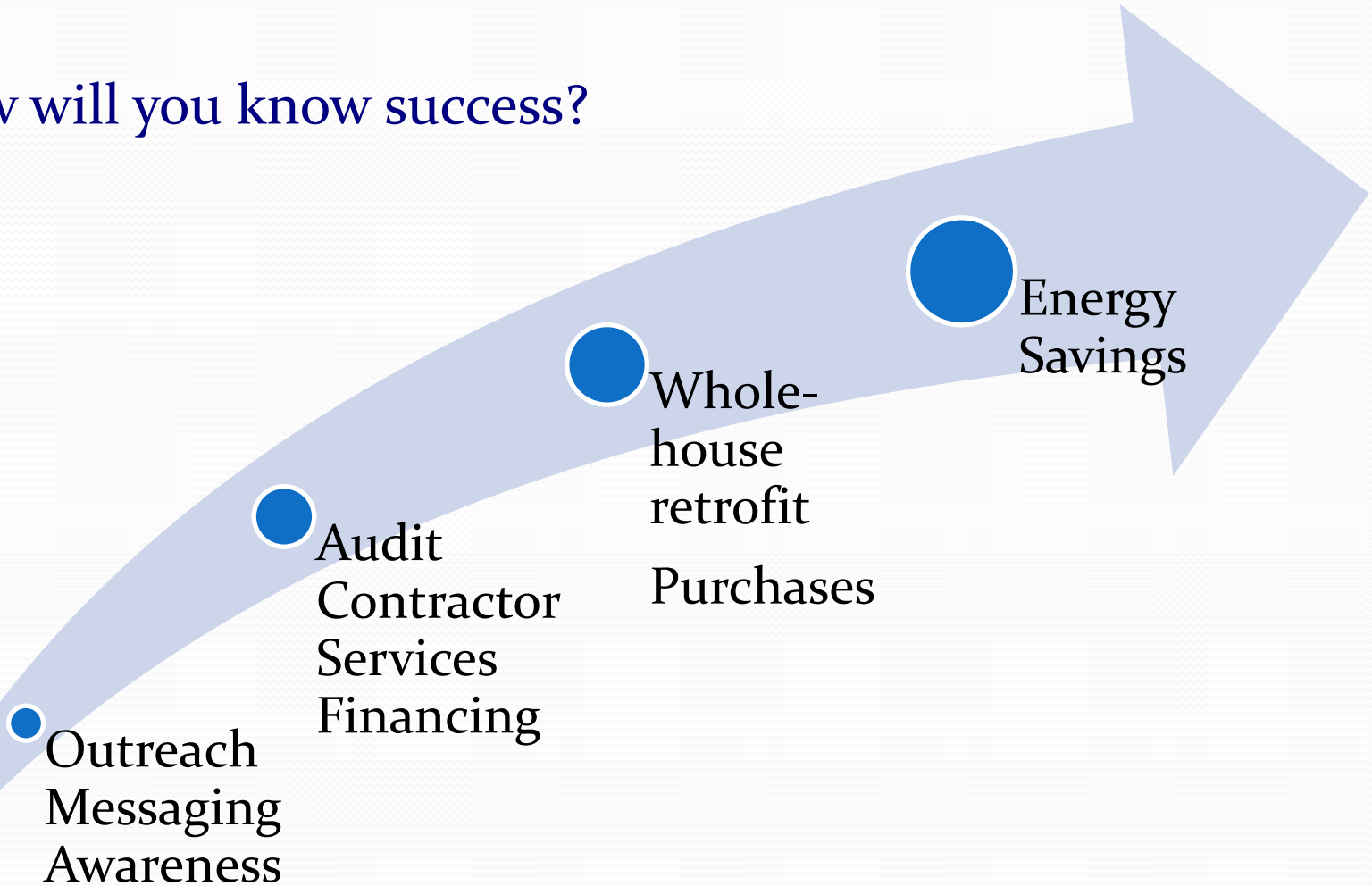


# Evaluation = Systematic Feedback



# First, What is the Program Trying to Do?

How will you know success?



# Who Has Possible Answers?

- By issue, who is closest to the experience?
- Who else is involved in the experience?



# A Word About Privacy and Respect

- Privacy is something people value highly
- Privacy protection is necessary and required
- Utilities therefore have many restrictions on access to customer information
- Requesting permission to use personal information to conduct research will help





# What You Need to Do

- Collect contact information
  - *Names*
  - *Phone numbers*
  - *Email and street addresses*
- How to collect contact information
  - *Applications or registration forms*
  - *Sign-up sheets (meetings or booths)*
  - *Auditor visits*
  - *Contractor visits*
- Offer that the information will be used for research purposes not for sales



# Generating Issues To Study

- What are we trying to do?
- What don't we know?
- What is it that seems to be getting in the way of our success?
- What types of feedback are we getting?
- What do we want to change?



# Use Issues to Develop Questions

Issues	Questions to Ask	Applicant	Drop out	Participant
Awareness	How did you hear about ...? (list of sources)	X	X	X
	What interested you in ...? (Open response)	X	X	X
Experience of service	Did you read the audit report? (Yes or No)	X	X	X
	Do you know what your next step is? (Yes or No)	X		X
	Which of the following best describes your next step? (list of options)	X		X
	Why did you not do the recommendations?		X	

# Survey Examples on Google Site

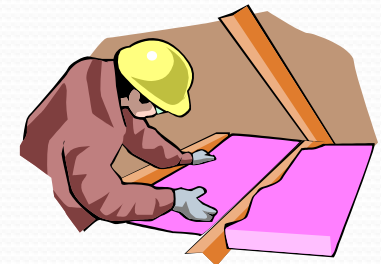
- Three for Consumers

- *Signed up*
- *Dropped out*
- *Participating*



- One for Contractors

- *General experience with the program*
- *Information about firms*



- Two types of documents

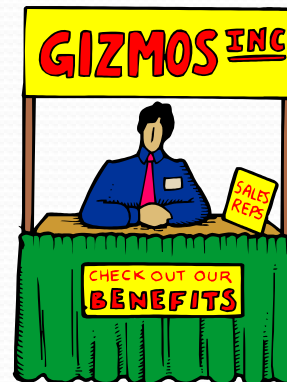
- *Matrix of issues of questions that could be used*
- *Sample set of questions*

# Listen and Collect Information

- Be systematic
  - *Select people to be contacted without preferences*
  - *Choose enough people to talk with*
- Try to use the same questions with all in a similar group
  - *Write the questions down*
  - *Try to stick to the question without changing the meaning*
- Listen and be open to bad news as well as good news

# Know Your Capacity

- Research experience: on team, volunteers, interns, or donated services
- Facilities: meeting room for 8-10 people, computer skills
- Access to different groups: meetings, outreach activities
- Contact information available: phone, email, address



# Using What You Learn

- Prepare a written summary of what you learned (or presentation)
  - *Share this with the team*
- Be prepared for people to be surprised
  - *If something seems really unexpected plan to revisit the topic with new questions*
- Make changes based on what you learn
- Do some more research to see how the changes affect people

# More Help May Be Available

- Local colleges
  - *Environmental or energy clubs*
  - *Psychology, sociology, political science, marketing research professors*
- Local research professionals
  - *American Evaluation Association*
  - *Members of local environmental or energy organizations*
- Interns
  - *Recent college graduates*
- Survey Monkey (low cost survey software)



# Questions?



research/into/action<sup>inc</sup>



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